

ORM INTEGRATION WORKSHEET

Introduction

This worksheet is designed to support and enhance the application of the various tools and job aids developed to support the ORM integration process. It serves as a checklist, worksheet, and record of the various steps involved in the process. Each of the various steps is optional and the user decides which elements to use or not use.

STEP 1 - IDENTIFY INTEGRATION TARGETS

1. Conduct an assessment to detect organizational changes that may impact on selection of integration targets (i.e. new commander, increased in number of personnel, budget constraints, etc.). List potential change issues below and briefly assess their potential positive or negative impact.

Change

Impact

- a.
- b.
- c.
- d.
- e.

2. Identify possible integration targets.
 - a. Horizontal targets (those designed to impact across the entire organization or major parts of it. Examples are generalized job aids or generic training programs.) Attempt to develop at least five horizontal targets.
 - 1.
 - 2.
 - 3.
 - 4.
 - 5.
 - b. Vertical targets (those designed to impact entirely or predominately on a single process or functional area. Examples are process redesign or specialized ORM training for a specific group in a single operating area.). Attempt to develop at least five vertical targets.
 - 1.
 - 2.
 - 3.
 - 4.
 - 5.

STEP 2 - ANALYZE INTEGRATION TARGETS

Consider using the decision matrix to assist in evaluating the various integration targets.

Step 1. Tailor the matrix (see below) by entering the integration targets in the space at the top. If necessary, use two or more matrix forms to accommodate all targets.

Step 2. Select the assessment criteria from those suggested and/or add any other criteria you consider important. Enter these criteria down the left side of the matrix.

Step 3. Add a weighting factor if desired. Simply consider the relative importance of the various assessment criteria and if one is about twice as important as another, award it twice the points.

Step 4. Evaluate the various targets you have identified against the assessment criteria you have selected and award the appropriate points. A ten is awarded to a target that is (1) stronger than any other target in a given assessment criteria, and (2) nearly as strong as can be envisioned in that criteria.

Step 5. When all targets have been evaluated against all assessment criteria, total the points down each column. Generally the targets that score the highest are the most attractive integration targets. However, REMEMBER, that the matrix is only a job aid and the decision-maker should evaluate the output of the matrix as one (albeit a very important one) factor in the overall decision.

EVALUATING THE TARGETS
RATE FROM 1 (LOW) TO 10 (HIGH)

Assessment Criteria	Weight (Optional)	(Enter Integration Targets Here)						
Easy to Integrate								
Hot Topic								
Strong Opportunity Potential								
Short-term Benefits								
Proven Examples to Model								
Easy to Find Resources								
Broad Application								
Involves both Military & Civilian								
Good Potential Leader Interest								
Involves the total Team								
Good Knowledge Base								
TOTAL								

THE STRONGEST FIVE TARGETS ARE:

- a.
- b.
- c.
- d.
- e.

STEP 3 - DEVELOP INTEGRATION STRATEGIES & TACTICS

Evaluate Integration Strategies. Become familiar with the list of 12 integration strategies. Consider the potential role of these strategies in connection with each of the stronger integration targets developed in step 2. A suggested way of doing this is to list the strategies that seem best suited to each target. Then consider which strategy or possible combination of strategies will be most effective in implementing ORM in a given target.

INTEGRATION TARGETS

STRATEGIES

Target #1 -

Target #2 -

Target #3 -

Target #4 -

Target #5 -

STEP 4 – SELECT THE BEST TARGETS

After carefully evaluating the best targets and the various strategies that might be applied to each, and taking into consideration your assessment of the current status of the organization, potential future issues, resource issues, etc., either make a decision regarding which targets and associated strategies to use or prepare a recommendation to the appropriate decision-maker and obtain a decision.

STEP 5 - IMPLEMENT SELECTED INTEGRATION TARGETS

Develop an integration plan. Based on the targets selected in section four above and on the strategies and associated key actions, you can develop an actual implementation plan using the template provided below. Use those elements of the template you find relevant and feel free to add other elements that you feel will be useful.

INTEGRATION PLAN TEMPLATE

1. PREPARATORY ACTIONS

1. Target Areas:
2. Composition of the planning team (offices, individuals, chief, approving authority):
3. Scope of application (consider the application scope - wide, narrow, etc.):
4. Timing considerations (how fast to proceed):
5. Power considerations (the degree of emphasis, degree of “voluntariness”):
6. Marketing plan (procedures to build support from all relevant parties involved):
7. The role of commander (consider using the 12 leadership techniques from Module 2):

2. THE PLANNING TIMELINE

Action #1:

Responsible office/person(s):

Key milestones:

Key performance measures:

Action #2:

Responsible office/person(s):

Key milestones:

Key performance measures:

3. PERFORMANCE MEASURES

1. Effectiveness measures.
 - a. Loss reductions:
 - b. Operational enhancements:
 - c. Sustainability of integration:
2. Efficiency measures.
 - a. Adherence to timeline:
 - b. Adherence to budget:
3. Perception measures.
 - a. Leader perceptions:
 - b. Operator perceptions:

STEP 6 - SUPERVISE & REVIEW

Measure Efficiency – Adherence to budget, schedule, and resource demands.

Measure Effectiveness – Evidence of positive mission impact.

Measure Perception – The attitudes and reactions of all relevant groups.

Measure Sustainment – Opportunities detected and results of process changes.